

INSURANCE PLAN COST REPORT INSTRUCTIONS

Go to **HRBEN0074** (Insurance Plan Cost)

Click on **Search Helps** button

The screenshot shows the 'Insurance Plan Costs' form. At the top, there is a menu bar with buttons: Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, and Get Variant.... Below the menu bar, there are three buttons: 'Further selections', 'Search helps' (highlighted with a red box and a blue arrow), and 'Org. structure'. The form is divided into three sections: 'Key date' with radio buttons for 'Today' and 'Other keydate', and a 'Key Date' text field; 'Selection' with a 'Personnel Number' text field and a selection icon; and 'Additional selection' with fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each followed by a 'to' field and a selection icon.

Select **"K" Organizational Assignment**

Click the **Green Check**

The screenshot shows the 'Restrict Value Range (1)' dialog box. It has a menu bar with buttons: Menu, Save as Variant..., Back, Exit, and Cancel. Below the menu bar, there are two buttons: 'Further selections' and 'Search helps'. The dialog box is divided into two main sections. The left section contains the same form elements as the previous screenshot: 'Key date' (radio buttons for 'Today' and 'Other keydate', and a 'Key Date' text field), 'Selection' (a 'Personnel Number' text field and a selection icon), and 'Additional selection' (fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each followed by a 'to' field and a selection icon). The right section is a list of options, each with a checkbox and a label. The options are: A Ownership matchcode (non applicable), B PDC error indicator, C Personnel ID Number, D Part-time employees (D), E Buyer, F Construction industry - organizational assignment, G Date of birth, H Sickness cert.data (A), I IC number, J Last name - first name - birth name, K Organizational assignment (highlighted with a red box and a blue arrow), L Time Data Administrator, M Schedules, N Last name - First name, O HR Master Record: Infotype 0302 (Additional Actions), P Last name - First name (KR), and Person ID. A green checkmark is visible in the top left corner of the dialog box.

Enter **Organizational Unit** pertaining to your Location

Click **Green Check**

The screenshot shows the 'Restrict Value Range' dialog box. On the left, there are sections for 'Further selections', 'Key date', 'Selection', and 'Additional selection'. The 'Organizational unit' field is highlighted with a red box, and a blue arrow points to it. At the bottom left, a blue arrow points to the 'Green Check' icon in the toolbar.

Field	Value
Personnel area	
Personnel subarea	
Employee group	
Employee subgroup	
Payroll area	
Company Code	
Cost Center	
Organizational unit	
Organizational key	
Administrator group	
Time administrator	
Last name	
First name	

(You can use match code to select Organization Unit)

The screenshot shows the 'Organizational Unit (1)' search criteria table. The table has columns for Language Key, Org.unit, Start Date, End Date, and Org.Unit Short Text. The first row is highlighted in orange.

Language Key	Org.unit	Start Date	End Date	Org.Unit Short Text
EN	10000001	01/01/1900	12/31/9999	Kentucky Human Resources
EN	10006001	01/01/1900	12/31/9999	Adair County Bd of Ed
EN	10006002	01/01/1900	12/31/9999	Allen County Bd of Ed
EN	10006003	01/01/1900	12/31/9999	Anchorage Independent
EN	10006004	01/01/1900	12/31/9999	Anderson County Bd of Ed
EN	10006005	01/01/1900	12/31/9999	Ashland Independent
EN	10006006	01/01/1900	12/31/9999	Augusta Independent
EN	10006007	01/01/1900	12/31/9999	Ballard County Bd of Ed
EN	10006008	01/01/1900	12/31/9999	Barbourville Independent
EN	10006009	01/01/1900	12/31/9999	Bardstown Independent
EN	10006010	01/01/1900	12/31/9999	Barren County Bd of Ed
EN	10006011	01/01/1900	12/31/9999	Bath County Bd of Ed
EN	10006012	01/01/1900	12/31/9999	Beechwood Independent
EN	10006013	01/01/1900	12/31/9999	Bell County Bd of Ed
EN	10006014	01/01/1900	12/31/9999	Bellevue Independent
EN	10006015	01/01/1900	12/31/9999	Berea Independent
EN	10006016	01/01/1900	12/31/9999	Boone County Bd of Ed
EN	10006017	01/01/1900	12/31/9999	Bourbon County Bd of Ed
EN	10006018	01/01/1900	12/31/9999	Bowling Green Independent
EN	10006019	01/01/1900	12/31/9999	Boyd County Bd of Ed
EN	10006020	01/01/1900	12/31/9999	Boyle County Bd of Ed
EN	10006021	01/01/1900	12/31/9999	Bracken County Bd of Ed
EN	10006022	01/01/1900	12/31/9999	Breathitt County Bd of Ed

More than 150 input options

Click **Execute**

Insurance Plan Costs

Menu | Save as Variant... | Back | Exit | Cancel | System | **Execute** | Get Variant...

Further selections | Search help K | Org. structure

Key date

☒ Today
☐ Other keydate
Key Date

Selection

Personnel Number

Additional selection

Benefit area	01			
1st Program Grouping		to		
2nd Program Grouping		to		
Benefit plan		to		

On the next page is what the generated report should look like, if you scroll down you will find Optional and Dependent Coverage's with proper plans and premiums.

Important note: This example of the generated report reflects columns that are hidden. If you choose to hide columns after the report has generated, right click on the column you wish to hide and click **HIDE** and that column will disappear from viewing.

The columns that you will find useful are:

Benefit Plan Text (Plan Types: Basic, Optional, Dependent)

Pers. No.

Name

ID Number (Social Security Number)

G (Gender)

Entry

Part.Date (Participation Date)

Insurance Option Text (Coverage Volume)

EE Cost

ER Credit

Ins. Coverage

Birth Date

To print, Click **Local File**

Insurance Plan Costs

Menu Back Exit Cancel System Details Sort in Ascending Order Sort in descending order Set filter Total Print preview **Local file...** Mail recipient More...

Key date 10/06/2011
Benefit area 01 Comm of KY

Benefit plan text	Pers.No.	Name	ID number	G	Entry	Part.date	Insurance option text	EE Cost	ER Cre
Basic Life and AD&D				F	07/01/2011	09/01/2011	\$20,000	0.00	1.
				M	08/01/2011	08/01/2011	\$20,000	0.00	1.
				M	05/01/2011	05/01/2011	\$20,000	0.00	1.
				F	03/01/2011	10/01/2010	\$20,000	0.00	1.
				F	08/11/2011	10/01/2011	\$20,000	0.00	1.
				F	03/01/2011	10/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				M	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				F	03/01/2011	01/01/2010	\$20,000	0.00	1.
				M	03/01/2011	01/01/2010	\$20,000	0.00	1.

Page 1 /4

Click **Spreadsheet**

Click **Green Check**

Save list in file...

In which format should the list be saved ?

☐ unconverted

☒ Spreadsheet

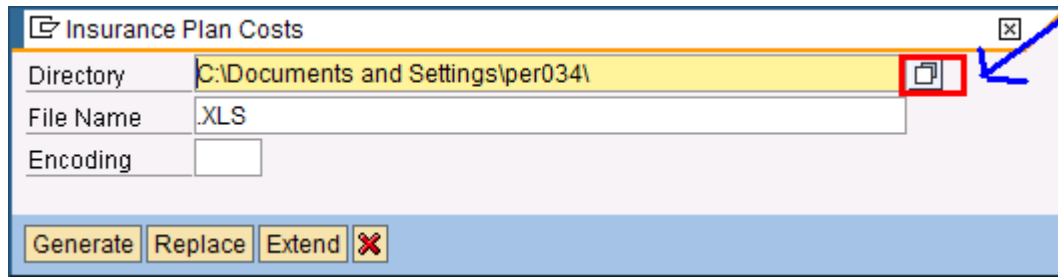
☐ Rich text format

☐ HTML Format

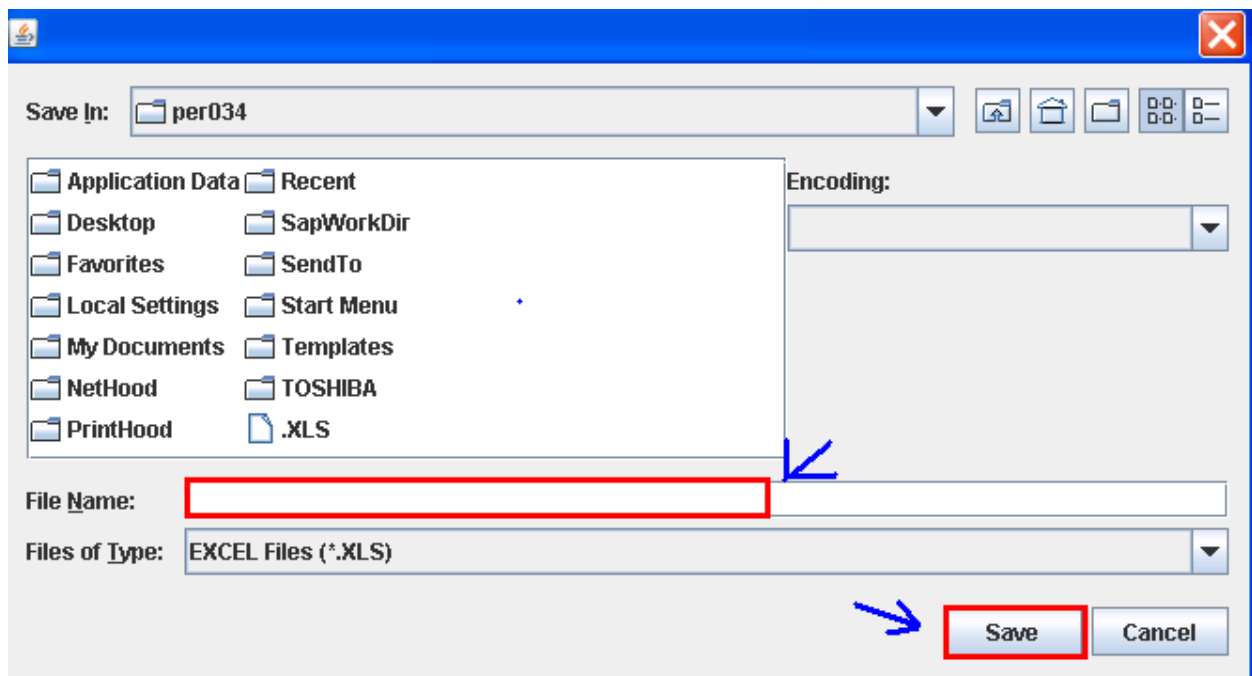
☐ In the clipboard

☒ ☐

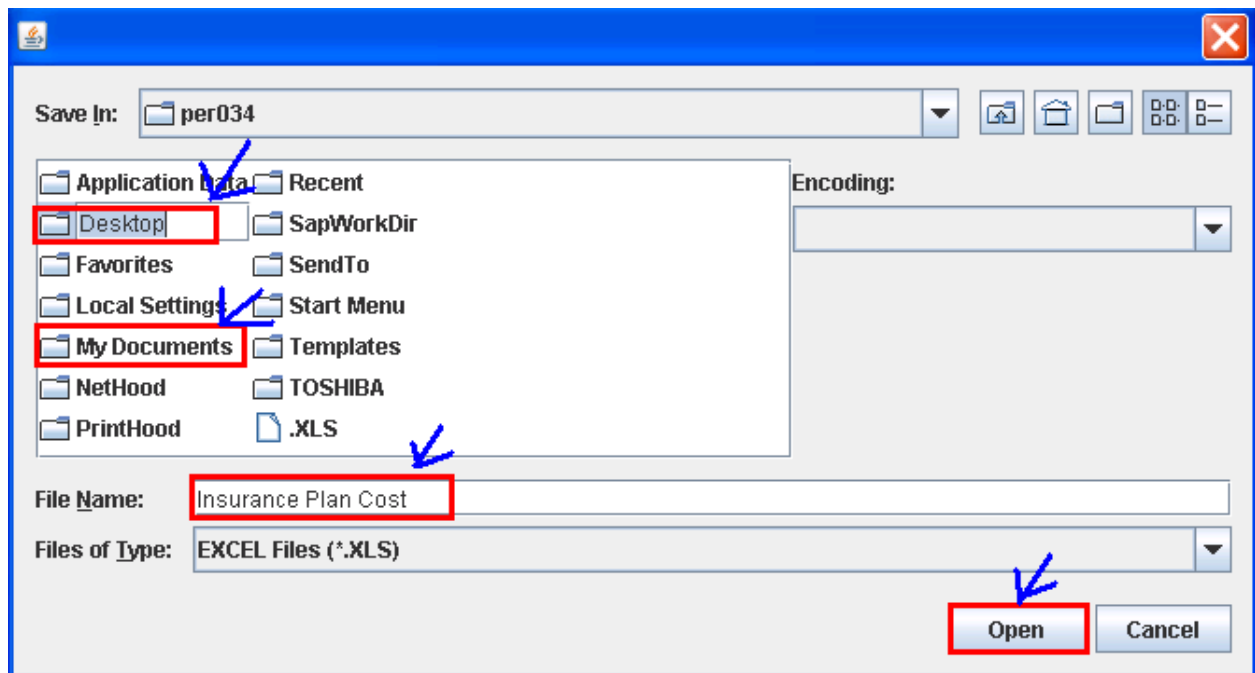
Click on your matchcode below



This box will pop up allowing you to name and save your report to your local directory



Per screen print below, the example has the file named **Insurance Plan Cost** and will either **Save** to the **Desktop** or to **My Documents**. You will be able to save wherever you choose.



Click **Open**

This will allow you to open the **Excel report** and to allow **print** capabilities.